

Research note

By MAKE Consulting

February 2008

WTG Market Shares 2007

Agenda:

- Global market 2007
 - Market share development
- Top 10 markets
 - Market share development

The criterion on which we have calculated the market shares is based on completed projects, i.e. mechanically installed and fully commissioned wind turbines, grid available and connected – either operating or fully ready to operate. For this purpose we used different sources both on the demand and supply side as well as several organisations in order to verify the country-specific project lists that we have compiled.

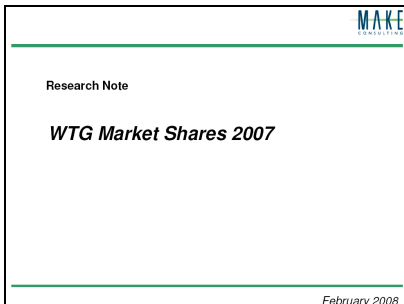
The market share development in 2007 was to a high degree on a par with expectations except for the fact that Sinovel increased its market share significantly due to the strong Chinese market.

Vestas continued to be the number one manufacturer with a market share of close to 21% down from 24.6% in 2006.

Gamesa is now no. 2 with a market share of 15.5% (up from 13.1% in 2006) closely followed by GE with 14.3% (down from 15.3% in 2006). Enercon continued its drop from 15% in 2006 to 11.8% in 2007.

As number 5 and 6, Siemens and Suzlon is positioned similar to last year with 6.8% and 6.5% in 2007, respectively.

Other players in top 10 include Goldwind (4.3%), Acciona (3.6%), Sinovel (3.3%), Nordex (3%) and REpower (2.5%).



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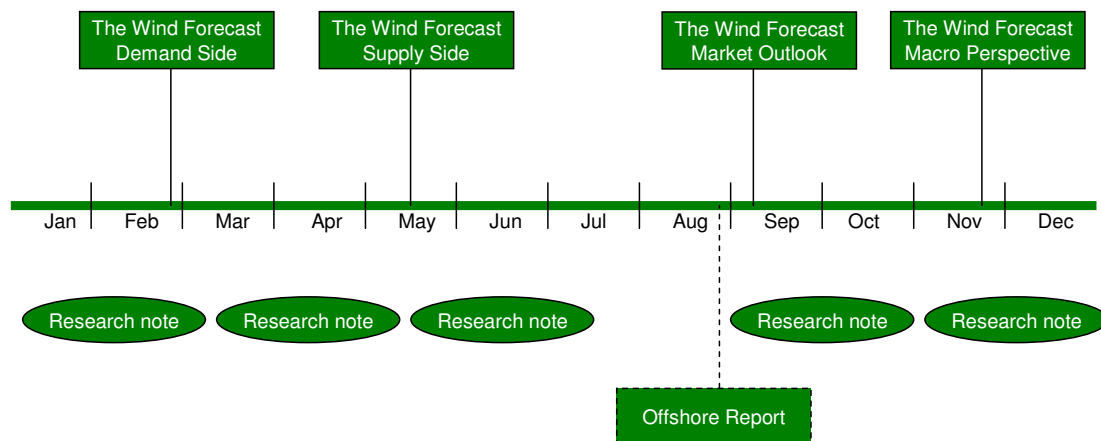
Our research brings you detailed market views, outlooks, competitive analysis, strategies, trends and perspectives through out the entire value chain. Our market reports and research notes typically provide you with detailed market analysis by country, profiles, strategies and expectations of developers, utilities, wind turbine manufacturers and component suppliers as well as trends and perspectives in the industry.

The mission is to provide a balanced data and analysis framework enabling our clients to decide upon strategic investments in order to grow profitable in this fast growing market.

A one-year research subscription package includes:

- Four market reports of “The Wind Forecast”
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As a guideline, our research will be available as illustrated in the figure below:



The Wind Forecast – Demand Side

...includes among others year-in-review market data, drivers and barriers for developers and utilities, trends on demand side like new players, strategies and cross-border movements. It also includes strategies, wind farm ownership tables, product portfolios, etc. for the top players on demand side. Furthermore, updated and revised country specific market forecasts are also part of the report.

The Wind Forecast – Supply Side

...includes among others trends on supply side like sourcing, new players, supply chain development and strategies and internationalisation. It also includes strategies, market share data, performance and expectations of wind turbine manufacturers and main component suppliers. Furthermore, updated and revised country specific market forecasts are also part of the report.

The Wind Forecast – Market Outlook

...includes among others detailed market analysis by country including historical development, legal framework and subsidy schemes, products, drivers and barriers, risk profiles, market trends and forecast. It includes detailed five and ten years market forecasts for wind turbine development and installations for more than 20 countries.

The Wind Forecast – Macro Perspective

...includes among others competitive analysis of renewable energy vs. conventional energy including e.g. investments, costs, subsidies, OMS, capacity, drivers and barriers. Furthermore, the report includes a comparison of the different renewable energy sources. Furthermore, updated and revised country specific market forecasts are also part of the report.

Research notes

...include detailed analysis on specific trends in industry like e.g. capacity shortages, strategic changes in competition, major activities among players, etc. Research notes can also include detailed market analysis on new emerging markets.

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